Customization guide for ProspectFinder® for Salesforce

Objective: The following are step-by-step instructions on how to implement the ProspectFinder for Salesforce application.
Please follow these instructions in the order presented to ensure a seamless, straightforward implementation.
Please note that you need to have a ProspectFinder Webservice account prior to implementing this application on your Salesforce account. If you don't have your ProspectFinder account details please contact Enecto AB at salesforce@enecto.com

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Step 1: Implementing ProspectFinder Java-scripts on your website

1. Start by choosing which pages on your website you want to track.
- Tip: Choose those pages that generate good information on what the visitor/company is interested in. We recommend for example: Product pages, price lists, contact info.
- Tracking the Start-/Index page is also recommended because it will provide you with referral information (searchengine and words).

2. How to submit the pages you have chosen in ProspectFinder.
- Login to ProspectFinder with the username and password provided to you by Enecto (www.enecto.com)
- Go to Account | Add Page
- Give the chosen page a name, use for example a product name or the name on the webpage.
- Add the unique URL-code of the page, for example www.enecto.com/contactinfo
- Optionally, you can choose which category the page belongs to.
- Click 'Add Page'. You have now created a page, repeat the procedure for all the pages you want to track

3. How to generate the tracking code for each page
- Go to Account | Pages - Here you can see the pages (which now have been given an unique name) that you have created so far.
- For page details and tracking code double click on each page or the details icon.

4. Implementing the code on each page.
- In the box 'Tracking Code' you will find the code you need.
- Highlight the code and copy by using Ctrl and C key on your keyboard. Open your website through a webeditor and place the code before the last body tag </body>.
- Repeat for each page you have created a tracking code for. NOTE: Each page has it's own unique code.
- When you have finished implementing the tracking codes, load the pages onto the web server (this procedure may vary depending on if you are using a content management system). You are now ready to start implementing ProspectFinder for Salesforce

Step 2: Installing ProspectFinder for Salesforce from AppExchange

Please review the AppExchange help manual to see the process of adding the ProspectFinder solution from AppExchange to your Salesforce account.

Step 3: Create Custom Fields on Leads and Accounts

This step will vary slightly depending on your Salesforce version, configuration and existing custom fields.
E.G. if there already exists a standard or custom field for D-U-N-S number it will be possible to syncronize D-U-N-S numbers from ProspectFinder with the existing field (see Step 6: Configure SFDC Sync options in ProspectFinder for more details about syncronizing with the various fields).

Furthermore you have the option of not adding any fields that your organization will not be using, though we recommend not leaving out any of the recommended fields and rather not include unwanted fields in Page Layouts (see Step 5: Set up Account and Lead Page Layout).

When adding fields;
- Description and Help Text are optional.
- Default Value is always left empty (exception is New Visitor where Default Value is Unchecked).
- Required is always NO (empty checkbox).
- Decimal Places is always 0 (zero).

At the step Establish field-level security leave everything at default values and click Next. At the step Add to page layouts always uncheck all page layouts before saving the new custom field.

IMPORTANT: While the fields [Revenue], [Profit] and [Net Worth] technically can be set to data type [Currency] we do not recommend doing so. This because ProspectFinder will send values in these as EUR, but Salesforce show you the amount in the current users local currency without converting the amount. For this reason we also recommend adding [Revenue] as a custom field even if there already is a standard field for this (which is locked to data type [Currency]).

Recommended Custom Fields:

Data Type	Field Label	Length	Unique	External ID
Text Area	Pages Visited	N/A	N/A	N/A
Text	D-U-N-S	20	YES	YES
Text	Company ID	20	NO	YES
Text	Time Spent	20	NO	NO
Date/Time	Visit Start	N/A	N/A	N/A
Date/Time	Visit End	N/A	N/A	N/A
Date	Last Visit	N/A	NO	N/A
URL	Referer	N/A	NO	N/A
Text	SIC Code	20	NO	NO
Text	SIC Text	255	NO	NO
Number	Employees	8	NO	NO
Number	Revenue		NO	NO
Number	Total Page Value	8	NO	NO
URL	Website	N/A	NO	NO
Number	Pageviews	8	NO	NO
Checkbox	New Visitor	N/A	NO	NO
Text	Search Engine & Words	255	NO	NO
Text	Organization Keywords	255	NO	NO

Optional Custom Fields:

Data Type	Field Label	Length	Unique	External ID
Text	Year Started	8	NO	NO
Text	Page Keywords	255	NO	NO
Text	Financial Year End	8	NO	NO
Text	Former Name	255	NO	NO
Text	Tradename	255	NO	NO
Number	Networth	18	NO	NO
Number	Profit	18	NO	NO

IMPORTANT: If some of these fields already exists in Salesforce but has a different data type than in this chart it may lead to errors when syncronizing. The sync will not complete and not run again until you have either changed the field to the correct data type or removed sync to that field.
Example: If you set Company ID to data type Number, and one of your visitors has letters in their Company ID the sync will fail.

Step 4: Map Lead fields between Lead and Account

At the Leads Fields view click the Map Lead Fields button and proceed to map the lead fields to suitable fields on Account.

Example of Lead Custom Field Mapping (next page):

Lead Custom Field Mapping

Take this lead custom field...	...and map it to this field
Company ID	Account.Company ID
Current Generator(s)	--None--
D-U-N-S	Account.D-U-N-S
Financial Year Ends	Account.Financial Year Ends
Former Name	Account.Former Name
Last Visit	Account.Last Visit
Networth	Account.Networth
New Visitor	Account.New Visitor
Number of Locations	--None--
Organization Keywords	Account.Organization Keywords
Page Keywords	Account.Page Keywords
Pages Visited	Account.Pages Visited
Pageviews	Account.Pageviews
Primary	--None--
Product Interest	--None--
Profit Loss	Account.Profit Loss
Referer	Account.Referer
Revenue	Account.Revenue
Search Engine & Words	Account.Search Engine & Words
SIC Code	--None--
SIC Text	Account.SIC Text
Time Spent	Account.Time Spent
Total Page Value	Account.Total Page Value
Tradename	Account.Tradename
Visit End	Account.Visit End
Visit Start	Account.Visit Start
Year Started	Account.Year Started

Save Cancel

NOTE: Since a Lead Field cannot be mapped to a Standard Field in Salesforce SIC Code cannot be mapped to SIC Code on Account. However, once the syncronization runs again SIC Code on a Account converted from Lead will update with SIC code from ProspectFinder.

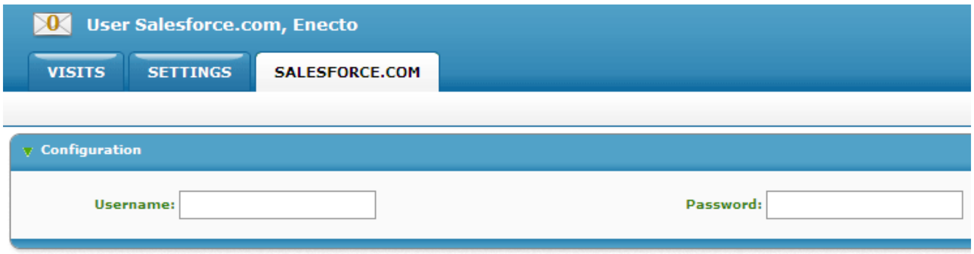
Step 5: Set up Account and Lead Page Layout

Set up the Account and Lead Page Layouts to include the newly created Custom Fields. We recommend adding a new section for ProspectFinder Visits information, and adding any new company or financial information to the existing section.

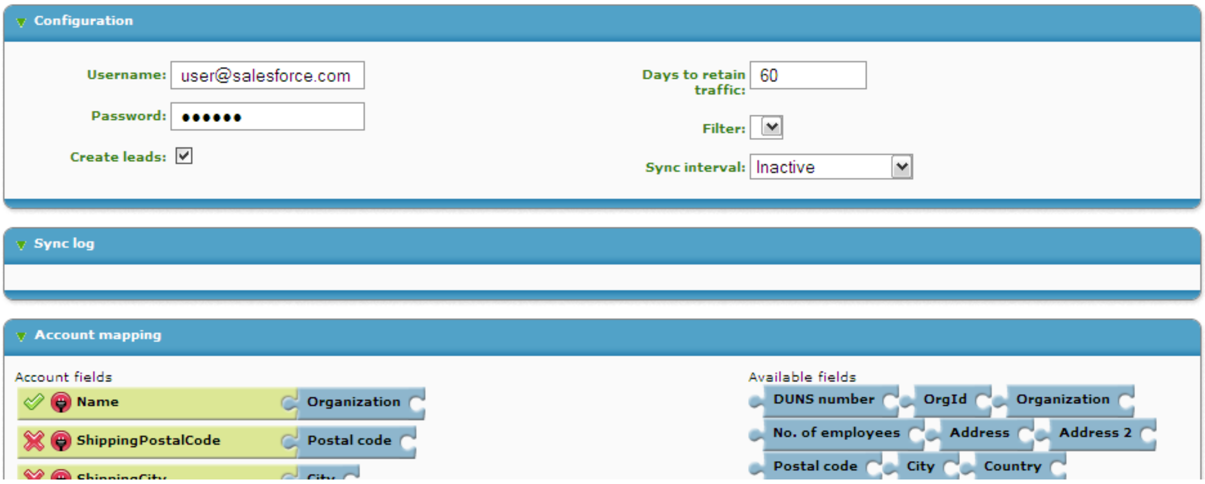
For more information on setting up Account and Lead Page Layouts please refer to the Salesforce documentation.

Step 6: Configure SFDC Sync options in ProspectFinder

Log in on the Salesforce Sync account with the login details you received by email from Enecto when the ProspectFinder webservices account was set up for you. If you have not received this email please contact Enecto Support at +46 8505 365 55 or support@enecto.com
Click the SALESFORCE.COM tab and proceed to enter Username and Password for the Salesforce user account that will be used for syncronization and click Verify. This account needs the appropriate rights to create leads and modify all accounts in Salesforce. (NOTE: Password will appear in asterisk once account has been verified)



Once you have clicked Verify, ProspectFinder will attempt to connect to your Salesforce account and download the standard and custom fields availiable to syncronize with. If everything went well you should be seeing something like this:



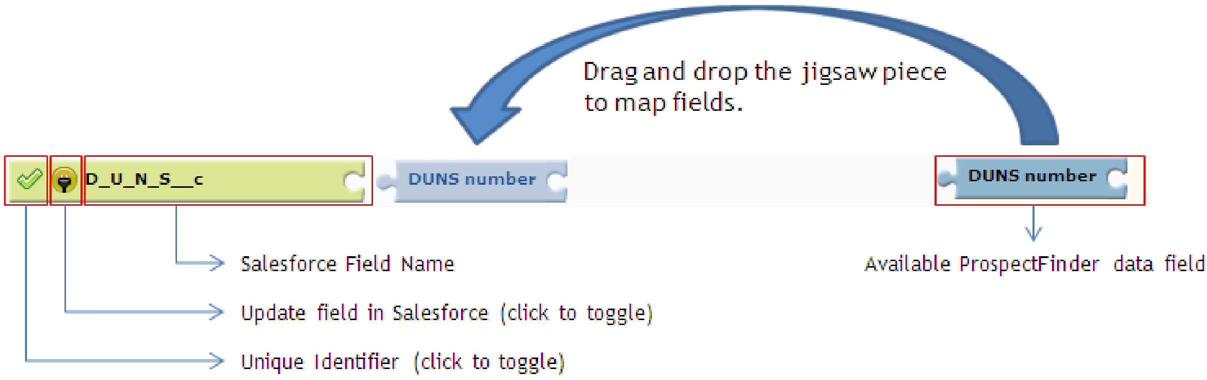
If not, it's most likely due to incorrect Username or Password, lack of Security Token (see Salesforce documentation for more information) or the account has insufficient privilegies in Salesforce. If after checking those you still cannot get further please contact Enecto Support.

Configuration:

Create leads – Whether the syncronization is allowed to create new leads in Salesforce. We recommend to have this setting OFF until installation and configuration is complete.
Days to retain traffic – The number of days that traffic information will be retained within Salesforce. Leads and accounts will not be deleted, only the visit information. To retain ALL traffic set this field to 0 (zero) (not recommended).
Filter – Leads can be filtered in ProspectFinder prior to syncronizing, this is where you choose what filter to use when syncronizing. For more info on filters contact Enecto Support.
Sync intercal – How often syncronization should happen, we recommed setting it to INACTIVE until installation and configuration is complete.

Account and Leads mapping:

The Accounts and Leads mapping in ProspectFinder is a drag and drop interface.
You can find all availiable data fields from ProspectFinder in the right column, from here drag and drop the jigsaw puzzle piece to the Salesforce.com field you wish to sync with in the left column.

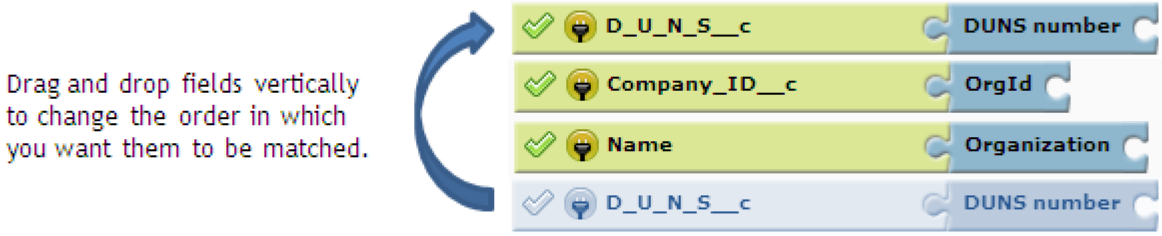


	Unique identifier enabled (used to match data)
	Unique identifier disabled (not used to match data)
	Field will not be updated, except when a new lead is created
	Field will be updated if empty in Salesforce.com
	Field will update even if data exists in Salesforce.com (OVERWRITE)

Setting unique identifier(s)

When ProspectFinder starts syncronizing with Salesforce it will start from the top of the list of fields and use the first match it finds. If no match is found and [Create leads] is checked it will create a new lead.

If you want a particular identifier to take precedence over the others drag and drop this field to the top of the list.



Start by finding the Salesforce fields you would like to match data on, drag and drop these to the top of the list and in the order you which you want them to match on. Make sure that Unique Identifier is enabled and map the the appropriate fields from ProspectFinder to these.
The most common identifiers are; D-U-N-S number, Company ID and Company Name.

Additional info:

You can map several ProspectFinder data fields to one Salesforce field. Below you can see an example of how this can be useful:

Take note of the [Custom text] field, this allows you to enter custom text that will always be sent to a field in Salesforce. Here we have used it to seperate Search Engine from the actual search words the visitor used.
[Custom text] is also commonly used when mapping these:
[LeadSource] – Default Value = ProspectFinder
[LastName] – A mandatory field when creating leads, Default Value = N/A

IMPORTANT: Don't forget to scroll down in ProspectFinder and repeat the process for matching Leads with ProspectFinder, as well as Accounts.

TIP: If you are using Firefox 3.x or newer you can hold CTRL and scroll the mousewheel to zoom in/out, this can make it easier to do the mapping. Furthermore doing this in Fullscreen View (F11) can also make it considerably easier.

Additional Information

Enecto Support
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