



improve it 360
an EverCommerce Solution

eLead

Best Practices

Agenda

Why wouldn't an eLead be automatically converted?

eLead Field Weighting – matching to existing Prospects

Managing the Unconverted eLeads List

Keep a clean Source list – no Duplicate Names, check for Active Owner

 Check for Sharing Rules! – 4 Sharing Rules are required for expected functionality

Verify the Payload – how is your lead provider sending the data?

Differences between Webhook and Emailed eLeads – fields and formatting

Lead Credit Report and Marketing Opportunity Times Called

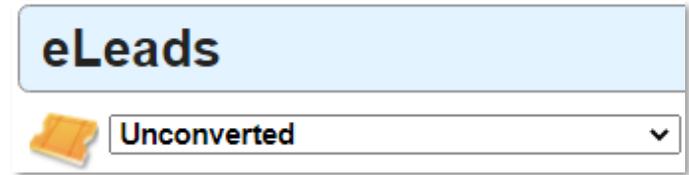
Why are some eLeads Unconverted?

TWO REASONS

1. There is a possible match, but the system is unsure
2. There is not enough required data to convert to a Prospect

Required Fields

- Source Type
- Source Name
- Taken On Date
- Last Name
- First Name
- either an Email address OR a Phone number OR a complete Address



These leads require human interaction to determine if the lead is valid and should be added to the database.

Which eLead data is matched to Prospects?

A “Match” is 15 Points or more of matching data points

No Match is less than 7 Points & “Conversion Issue” check box will be checked

Email address = 16 Points

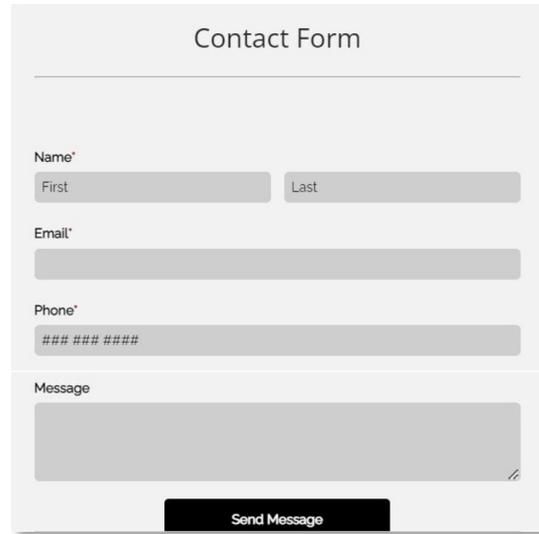
Phone = 11 Points

Last Name = 3.6 Points

First Name = 2.8 Points

Street Address = 1.3 Points

Zip Code = 1.1 Points



Contact Form

Name*

First Last

Email*

Phone*

####

Message

Send Message

BEST PRACTICE:

Make **Email** address and **Phone** required fields on any of your webforms

Interest is not required until an Appointment

These weighted settings cannot be configured. They are standardized across all improveit 360 systems.

Unconverted eLeads

The Unconverted eLeads list view will continue to grow!
Add a field filter to exclude eLeads created before a specific date.

BEST PRACTICE:
Convert eLeads daily

eLeads

 **Unconverted** ▼ [Edit](#) | [Delete](#) | [Create New View](#)

Keep the list clean!
Continue moving
the date forward as
you convert the
legitimate leads to
Prospects

Filter By Owner:

All eLeads
 My eLeads

Filter By Additional Fields (Optional):

Field	Operator	Value	
Conversion Issue	equals	True	 AND
Created Date	greater than	2/8/2023	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Keep your Source list clean

Settings

Sources Product Categories Em

Active Sources Edit Delete Create New View

Active Sources

All Sources

Expired Sources

2020 Home and Garden Show

2020 Home and Garden Show

No Duplicate Names!

Settings

Sources Product Categories Email Advanced Other Tasks Mobile

Active Sources Edit Delete Create New View

Action	Source Name ↑	Owner Active	Type	Start	End	Total Cost	Created Date
<input type="checkbox"/> Edit Del	104.2FM	✓	Radio	2/19/2019		\$2,100.00	2/19/2019
<input type="checkbox"/> Edit Del	2020 Home and Garden Show	✓	Show or Event	1/1/2020		\$1,200.00	5/11/2020
<input type="checkbox"/> Edit Del	2020 Ohio State Fair	✓	Show or Event	1/1/1995		\$11,000.00	
<input type="checkbox"/> Edit Del	2020 Spring Postcard	✓	Direct Mail	1/1/2020		\$27,000.00	
<input type="checkbox"/> Edit Del	2020 Spring Postcard	✓	Direct Mail	1/1/2020		\$0.00	7/15/2020

Change the Source Name (even if it has an End date) to prevent eLeads from being attributed to the wrong Source.

Make sure the Source “Owner” is an Active User

Sources Product Categories Email Advanced Other Tasks Mobile

Active Sources Edit | Delete | Create New View

New Source

Action	Source Name ↑	Owner Active	Type	Start	End	Total Cost	Created Date	Created By
<input type="checkbox"/> Edit Del	2020 Ohio State Fair	<input checked="" type="checkbox"/>	Show or Event	7/15/2019		\$3,500.00	7/18/2019	Olivia Admin , 7/18/2019 1:18 PM
<input type="checkbox"/> Edit Del	2020 Spring Postcard	<input type="checkbox"/>	Direct Mail	1/1/2020		\$375.00	6/4/2020	Martha Marketing , 6/4/2020 11:1...
<input type="checkbox"/> Edit Del	2020 Spring Postcard	<input checked="" type="checkbox"/>	Direct Mail	1/1/2020		\$0.00	7/15/2020	Olivia Admin , 7/15/2020 9:57 AM

Start 1/1/2020 Total Cost \$375.00

End

▼ System Information

Created By [Martha Marketing](#), 6/4/2020 11:18 AM Last Modified By [Olivia Admin](#), 7/15/2020 9:47 AM

Owner [Martha Marketing](#) [Change](#)

Edit Delete Clone Merge

Add the Created By field to a List View. Notice anyone who is not an Active User? If you aren't familiar with all your Users, follow along [HERE](#) to create an “Owner is Active” formula field on the Source object and change the Page Layout.

Check your system's Sharing Settings

The #1 Reason eLeads are not behaving as expected!

eLeads not converting to Prospects?

[Prospect Sharing Rule](#)

eLead is creating multiple Sources?

[Source Sharing Rule](#)

eLead gives an error when mapping Taker?

[User Sharing Rule](#)

Also check out our complete Guide to [eLeads Troubleshooting](#)

Limit of 50 Sharing Rules per Object

Source Sharing Rules		New	Recalculate
Action	Criteria	Shared With	
Edit Del	Source: Source Name NOT EQUAL TO	TrainingSite Site Guest User	

1 Rule per Object

- Account
- Source
- Prospect
- User

Verify the Payload – what data is the lead provider sending?

Web-to-eLead - 2 formats accepted

HTTP Post Query string

```
FirstName=Gandalf&LastName=TheGrey&Phone1=1235551234&Phone1Type=Mobile&StreetAddress=456+The+Shire&City=Oxford&State=OH&Zip=45056&Email=1234@fake.com&SourceType=Lead+Provider&Source=Website&Interest=Roofing
```

JSON

```
{  
  "FirstName": "Gandalf",  
  "LastName": "TheGrey",  
  "Phone1": "1235551234",  
  "Phone1Type": "Mobile",  
  "StreetAddress": "456 The Shire",  
  "City": "Oxford",  
  "State": "OH",  
  "Zip": "45056",  
  "Email": "1234@fake.com",  
  "SourceType": "Lead Provider",  
  "Source": "Website",  
  "Interest": "Roofing"  
}
```

Note: Phone number needs to be a 10-digit text string.

Product Category is “Interest” when using Web-to-eLead

Follow along with our Help Center article if you need to [Setup a Web-to-eLead Endpoint URL](#)

Verify the Payload – what data is the lead provider sending?

Email-to-eLead - 1 format accepted

Text string

Email Subject: Provider = Website

Email Body:

```
<?xml version="1.0" encoding="UTF-8"?>
<Lead>
<Email>1234@fake.com</Email>
<FirstName>Gandalf</FirstName>
<LastName>TheGrey</LastName>
<StreetAddress>456 The Shire</StreetAddress>
<City>Oxford</City>
<State>OH</State>
<Zip>45056</Zip>
<Product>Roofing</Product>
<Phone1>(123) 555-1234</Phone1>
<Phone1Type> Mobile</Phone1Type>
<Comments>A wizard is never late, nor is he early, he
arrives precisely when he means to.</Comments>
</Lead>
```

Note: Phone number must be formatted:
(xxx) xxx-xxxx

If sent as text string the Phone number will
end up in the Comments field

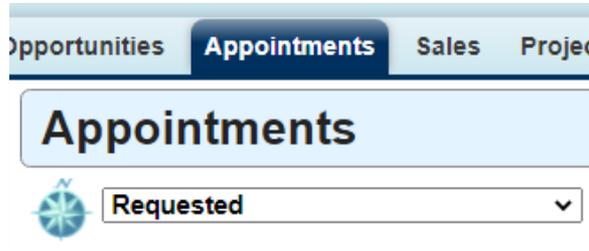
Product Category is “Product” when using
Email-to-eLead

Follow along with our Help Center article if you need to [Setup Email-to-eLead Email Address](#)

Field Formatting

Did you know, your customer can request an [Appointment](#) on a specific Date and Time using an eLead?

Check out the [Requested](#) List on the Appointments Tab



Taker	The full name of the person who took the lead that will get populated on the new Lead Source. This has to match exactly with an existing Staff name. I.E. 'John Doe'. If no match is found it will be ignored.
Product (Email-to-eLead) Interest (Web-to-eLead)	Can be a single value or multiple separated values e.g. "Doors;Gutters;Windows." For best results, these values should match up with the 'Product Categories' in your system.
RequestAppointmentDate	(yes, RequestAppontment is misspelled - missing the letter "i". If you try to spell it correctly, the value will be placed in comments.) If populated, an Appointment is automatically created in the system with this date. The Appointment will have a special status of 'Requested' so they can filtered on easily. Must be in either YYYY-MM-DD or MM/DD/YYYY format.
RequestAppointmentTime	(yes, RequestAppontment is misspelled - missing the letter "i". If you try to spell it correctly, the value will be placed in comments.) If 'RequestAppointmentDate' is populated, this will further populate the time on that Appointment. Format must be h:mm tt (i.e., '7:30 PM').
Date	The date this lead was taken on in either YYYY-MM-DD or MM/DD/YYYY format. Defaults to current date.

Check out our complete [Field Mapping Guide](#) for all supported eLead Fields

Pay per Lead - Lead Credit Report

Ask your Lead Providers if you can get a credit for Disqualified Leads!

Click [Customize](#) to add the Not Qualified Reason to the Report

Add a [Field Filter](#) to only see Disqualified Prospects in the Report

Click [Show Details](#) to see the Reason each Prospect was Disqualified

The screenshot shows a CRM report interface. At the top, there are filter controls: 'Filters' with an 'Add' button, 'Show' set to 'All eleads', and 'Date Field' set to 'Taken On' with a range of 'All Time'. A filter rule is highlighted with an orange box: 'Prospect: Not Qualified equals "True"'. Below this is a 'Preview' section with 'Summary Format' selected and a 'Show' button highlighted with an orange box. The table below has columns for 'eLead: eLead Name', 'Prospect: Not Qualified Reason(s)', and 'Prospect: Not Qualified'. A group is expanded for 'Source: 2020 Home and Garden Show (2 Records)'. The table contains two rows of data, each with a checkmark in the 'Prospect: Not Qualified' column.

eLead: eLead Name	Prospect: Not Qualified Reason(s)	Prospect: Not Qualified
Source: 2020 Home and Garden Show (2 Records)		
Drop a field here to create a grouping. Hide		
Kathryn Cather: 2020 Home and Garden Show	Bad or Old Data	<input checked="" type="checkbox"/>
Hollie Abernathy: 2020 Home and Garden Show	Out of Area	<input checked="" type="checkbox"/>

For more information on these Reports, visit our Help Center: [eLead and Lead Credit Reports](#)

How many times did we call the Prospect?

Lookup
 Select the picklist values to add below.

[Deselect all](#)

Value
<input type="checkbox"/> New Marketing Task
<input type="checkbox"/> New Appointment
<input checked="" type="checkbox"/> Prospect Flagged - Not Qualified
<input checked="" type="checkbox"/> Prospect Flagged - TCPA
<input checked="" type="checkbox"/> Prospect Flagged - Wrong Number
<input type="checkbox"/> Prospect Merge
<input checked="" type="checkbox"/> Prospect Flagged - On "Do Not Call" registry

Add a **Field Filter** to show only Completed Reasons that are Prospect Flagged

Add a **Grouping** to summarize by Source

Pull in the Campaign Name and Times Called to see how many times, and from which Campaign the Prospect was called

Marketing Opportunity Name	Taken On	Completed Reason	Times Called	Not Qualified Reason(s)	Campaign: Campaign Name
Source: Source Name: Facebook (1 record)					
			1		
Lewis, Alexander	Lewis, Alexander: Set Appointment	2/20/2019	Prospect Flagged - Not Qualified	1 -	Remarket
Source: Source Name: Home Depot #457 (1 record)					
			2		
Blaze, Jack	Blaze, Jack: Set Appointment	9/25/2021	Prospect Flagged - Not Qualified	2 Renter/Non-Owner	Reset
Source: Source Name: Instagram Hashtag Ad (2 records)					
			3		
Test, Greg	Test, Greg: Set Appointment	5/1/2020	Prospect Flagged - Not Qualified	2 Moved Away	Referrals: Intro Stage
Test, Greg	Test, Greg: Set Appointment	5/1/2020	Prospect Flagged - Not Qualified	1 Moved Away	Referrals: Ready to Set

Use Report Type: Prospects with Marketing Tasks with Campaigns

How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:
<https://support.improveit360.com/>
3. Or Email Us: support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

