eLeads

What are eLeads?
How does improveit 360 use them?
What your lead providers need to know when sending in eLeads?

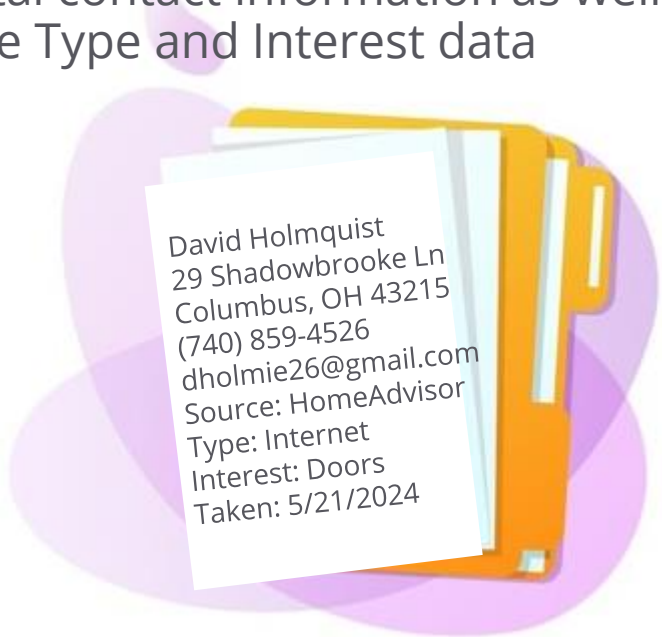
improveit 360

Agenda

- What are eLeads?
- What data is received in an eLead payload?
- Can we send data to custom fields?
- How are eLeads matched to existing Prospects?
- What happens when there is a “match”… what records are created?
- What if there is No Match or a Partial Match?
- What if data is missing from the payload?
- What payload formats does improveit 360 accept?
- What if a lead provider sends nested JSON?
- Common Troubleshooting Tips and Tricks

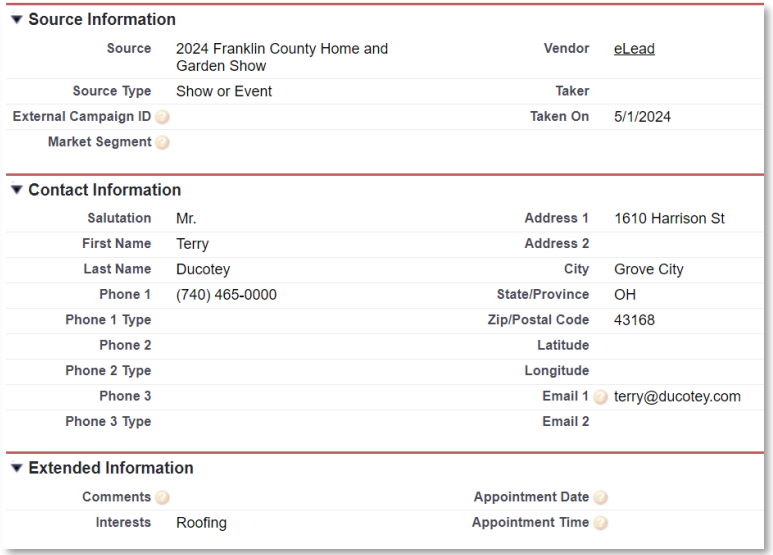
What are eLeads?

- An electronic Lead sent into the system by a third-party Lead Provider
- eLeads contain vital contact information as well as lead Source and Source Type and Interest data



What data is received in an eLead payload?

1. Source and Source Type
2. Taken On date
3. Prospect First and Last Name
4. Full Street Address (including City, State and Zip)
5. Phone Number
6. Email Address
7. Product Category of Interest
8. Taker (must match Staff record Name exactly)



Source Information

Source	2024 Franklin County Home and Garden Show	Vendor	eLead
Source Type	Show or Event	Taker	
External Campaign ID		Taken On	5/1/2024
Market Segment			

Contact Information

Salutation	Mr.	Address 1	1610 Harrison St
First Name	Terry	Address 2	
Last Name	Ducotey	City	Grove City
Phone 1	(740) 465-0000	State/Province	OH
Phone 1 Type		Zip/Postal Code	43168
Phone 2		Latitude	
Phone 2 Type		Longitude	
Phone 3		Email 1	terry@ducotey.com
Phone 3 Type		Email 2	

Extended Information

Comments		Appointment Date	
Interests	Roofing	Appointment Time	

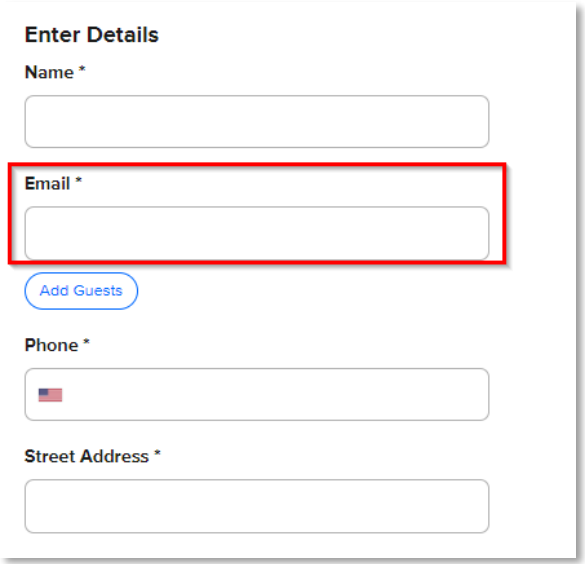
Check out our Standard eLead Field Mapping Guide

You can also Send data to Custom Fields

How are eLeads matched to existing Prospects?

- Weighting cannot be configured
- Standard across all improveit 360 systems
- 15 Points is a “match”

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

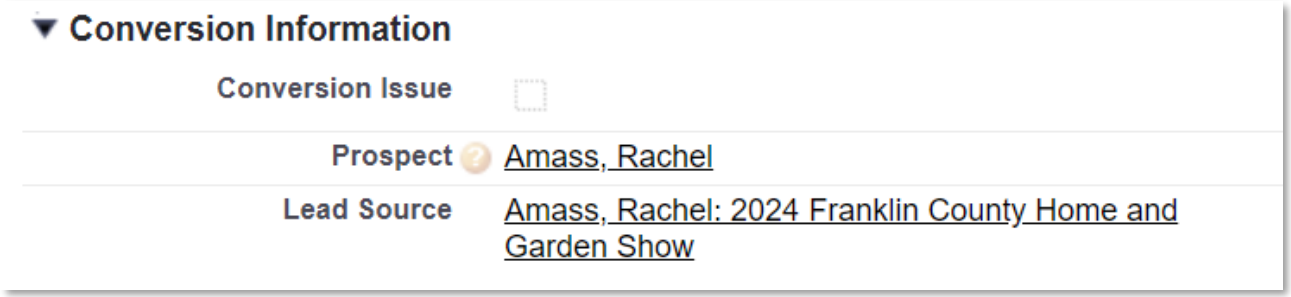


Note: the heaviest weighted field is Email Address. Email is the most unique identifier.

Tips & Tricks: Make **Email** a required field on all your web forms!

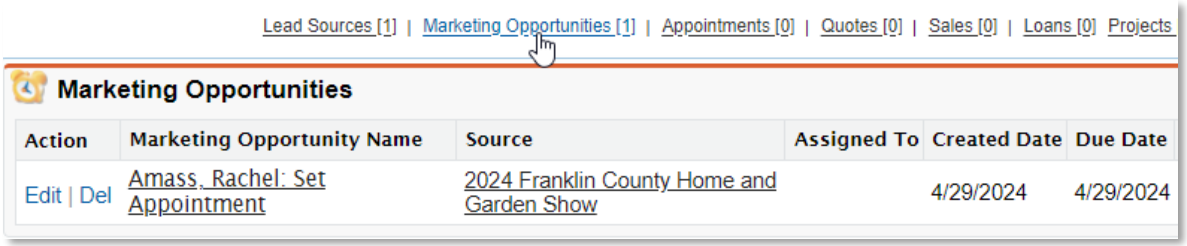
eLead with No Match

eLeads with No Match to any existing Prospects are automatically converted



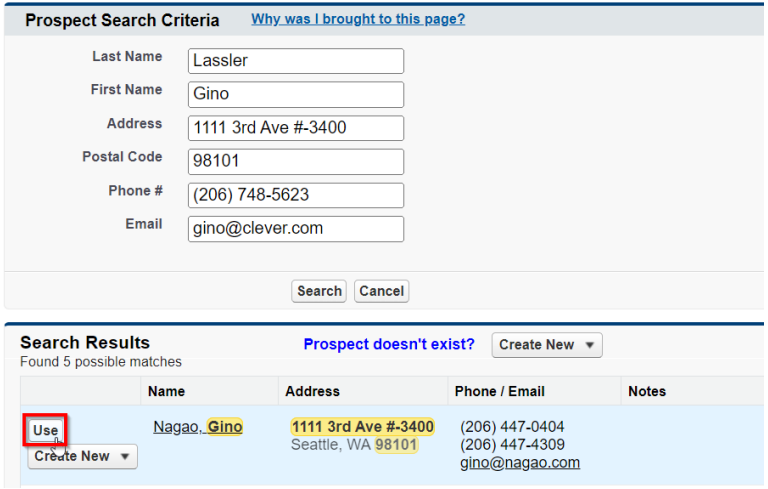
Records created:

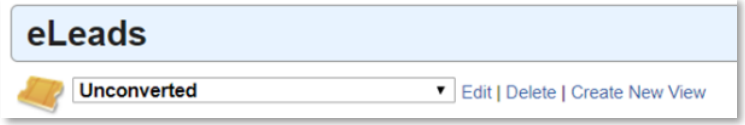
- Prospect
- Lead Source
- Marketing Opportunity

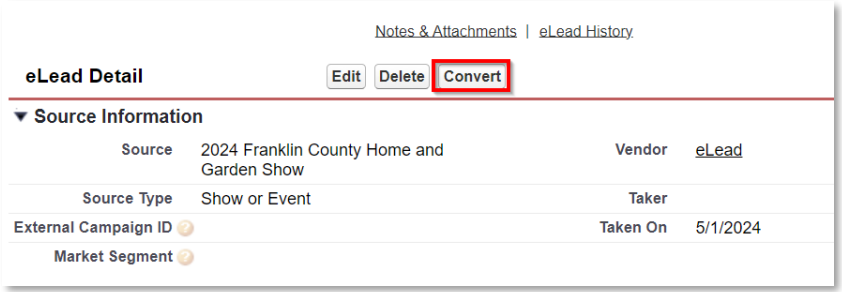


eLead with Partial Match – manual conversion

Less than 7 Matching data points
Go to **Unconverted** List View
Click the **Convert** button





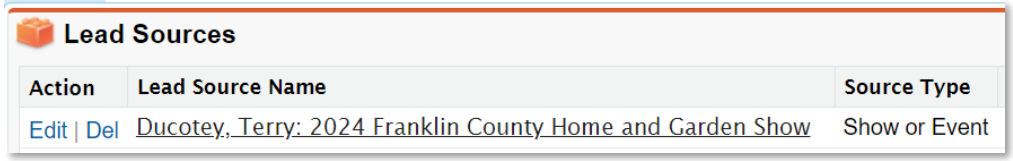


Check the list view regularly to avoid missed opportunities to Sell!

eLead – new Lead Source

Tracked on each unique Lead Source:

1. Source and Source Type
2. Taken On date
3. Product Category of Interest
4. Taker (must match Staff record Name exactly)



Lead Sources

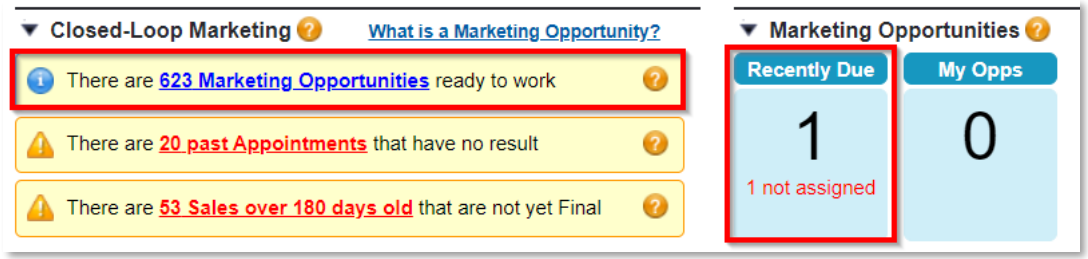
Action	Lead Source Name	Source Type
Edit | Del	Ducotey, Terry: 2024 Franklin County Home and Garden Show	Show or Event

	Lead Sources	Set	Canceled	Issue	Demo	Sold	Sold Price	Issue %	Demo %	Cancel %	Sold %	Set %
Source Name: 101.5FM **(6 records)**	5	6	0	6	5	4	$18,759.00	100%	100%	0%	80%	100%
Source Name: 104.2FM **(15 records)**	13	9	0	9	8	5	$17,834.00	69%	62%	0%	38%	69%
Source Name: 2020 Home and Garden Show **(356 records)**	346	20	3	13	13	9	$36,140.60	4%	4%	1%	3%	6%
Source Name: 2020 Ohio State Fair **(7 records)**	6	5	1	4	4	4	$18,848.05	67%	67%	17%	67%	83%

eLead – new Marketing Opportunity

Set Appointment

Marketing Opportunity with a Type of "Set Appointment" is created for the Prospect



Call from the Call Queue or use the Marketing Opps tiles from the homepage to call from a List View

What if critical data is missing from the eLead payload?

improveit 360 will assume certain data and populates the following if it is left blank:

Taken On date > Today's date

Source Type > Lead Provider or Manufacturer

Source > eLead

If you are seeing "Lead Provider" or "Manufacturer" in the source Type field, or "eLead" in the Source Name field, contact your lead provider and let them know their payload needs to contain the correct values. Follow our eLead Data Collection Best Practices for more…

What payload formats does improveit 360 accept?

HTTP Post Query String formatted like this:

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&Comments=A wizard is never late, nor is he early, he arrives precisely when he means to.

JSON formatted like this:

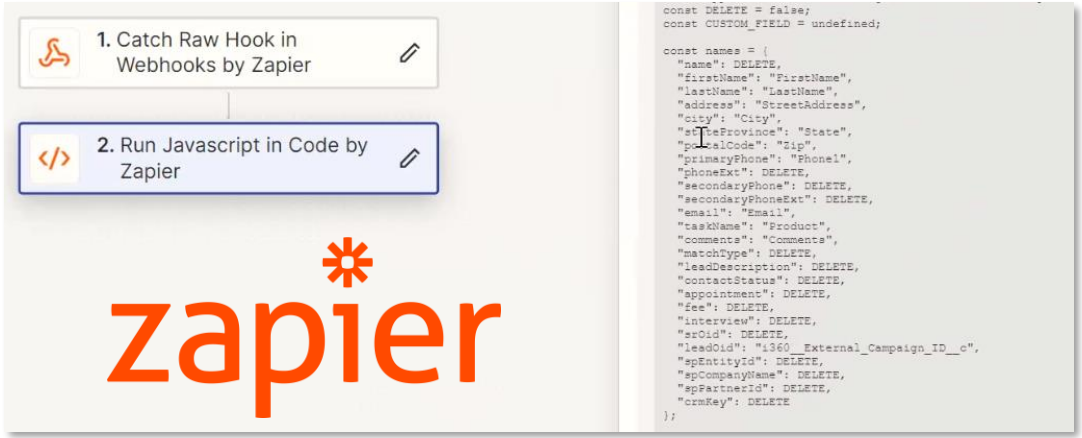
{
"FirstName": “Gandalf",
"LastName": "TheGrey",
"Phone1": "1235551234",
"Phone1Type": "Mobile",
"StreetAddress": “456 The Shire",
"City": “Oxford",
"State": "OH",
"Zip": “45056",
"Email": "1234@fake.com",
"SourceType": "Lead Provider",
"Source": “Website",
"Interest": “Roofing"
"Comments": "A wizard is never late, nor is he early, he arrives precisely when he means to."
}

What payload formats does improveit 360 NOT accept?

Nested JSON formatted like this:

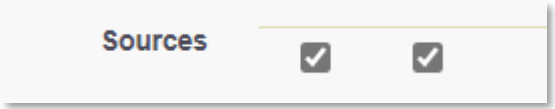
```
{ "first_name": "Gandalf",
"last_name": “TheGrey",
"email" : "1234@fake.com",
"sourceName": "Website",
"address": {
        "street_address": "456 The Shire",
                "subAddress": {
                "city" : "Oxford",
                "state" : "OH",
                "zip_code": "45056" }
        }
}
```

A Zapier account is required to parse the JSON and create a string to insert as the new payload which i360 will accept.



Troubleshooting – eLead causing Source Duplication

- Check the eLead User's Profile – ensure **Read** access on **Source** object
  Setup > **Sites** > choose Site > **Public Access Settings** > Edit
- Check for Sharing Rules – Sharing Rules on **Account**, **User**, **Source** and **Prospect**
  Setup > Security Controls > Sharing Settings > look for custom **Sharing Rules**

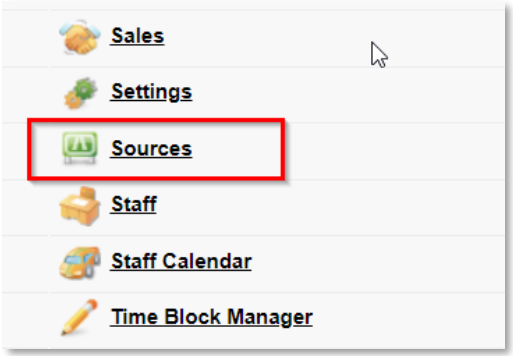


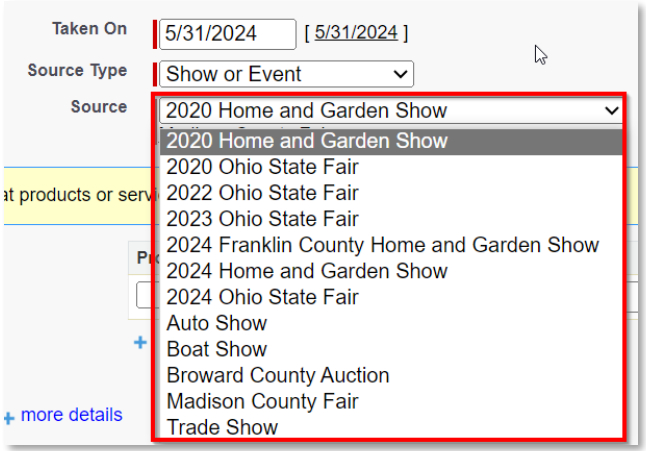
User Sharing Rules New Recalculate User Sharing Rules Help

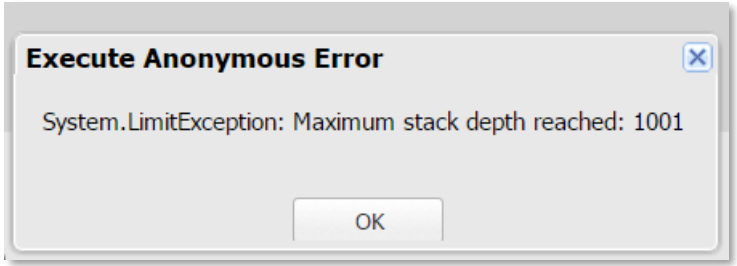
Action	Criteria	Shared With	User
Edit | Del	User: Active EQUALS True	AccountingSite Site Guest User	Read Only
Edit | Del	User: Active EQUALS True	HomeAdvisor Site Guest User	Read Only

Troubleshooting – 1,001 Collection Exceeded Error

- Email address associated with more than 1,000 Prospects – use the Data Loader to delete fake Email addresses
- More than 1,000 Active Sources under one Source Type value – give Sources you don't use an End date



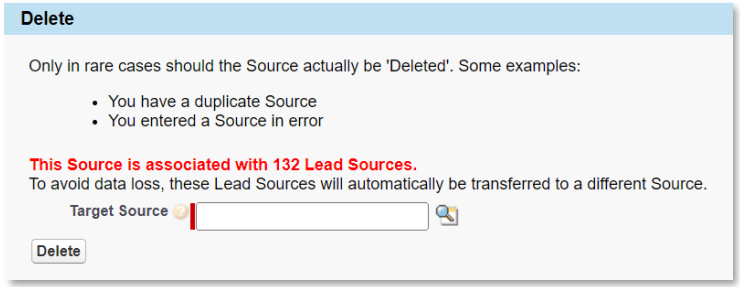




Troubleshooting – Merge Sources with Lead Sources & Costs

Delete Sources tool has limitations

Too many Lead Sources and Source Cost records will need to be moved to the Target Source using the Salesforce Data Loader



File Column Header	Name
Lead Source: ID	Id
Source: Record ID	i360__Source__c

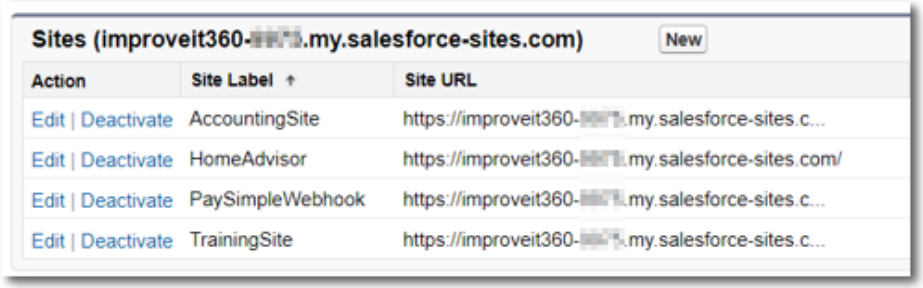
	A	B
1	**Lead Source: ID**	**Source: Record ID**
2	a0Mf200000NHstz	a0Of200000CLZgd
3	a0Mf200000NHsue	a0Of200000CLZgd
4	a0Mf200000NHsuj	a0Of200000CLZgd
5	a0Mf200000NHsvD	a0Of200000CLZgd
6	a0Mf200000NHswZ	a0Of200000CLZgd
7	a0Mf200000NHszo	a0Of200000CLZgd
8	a0Mf200000NHuWZ	a0Of200000CLZgd
9	a0Mf200000NHuWj	a0Of200000CLZgd
10	a0Mf200000NHv3B	a0Of200000CLZgd
11	a0Mf200000NHvLY	a0Of200000CLZgd
12	a0Mf200000NHvUH	a0Of200000CLZgd
13	a0Mf200000NHvj5	a0Of200000CLZgd
14	a0Mf200000NHvjs	a0Of200000CLZgd
15	a0Mf200000NHvrE	a0Of200000CLZgd
16	a0Mf200000NHw5I	a0Of200000CLZgd
17	a0Mf200000NHw7S	a0Of200000CLZgd
18	a0Mf200000NHwOa	a0Of200000CLZgd
19	a0Mf200000NHwOp	a0Of200000CLZgd
20	a0Mf200000NHwOz	a0Of200000CLZgd
21	a0Mf200000NHwQ0	a0Of200000CLZgd
22	a0Mf200000NHwQU	a0Of200000CLZgd
23	a0Mf200000NHwRw	a0Of200000CLZgd
24	a0Mf200000NHwII	a0Of200000CLZgd
25	a0Mf200000NHwo3	a0Of200000CLZgd
26	a0Mf200000NHwqO	a0Of200000CLZgd
27	a0Mf200000NHws5	a0Of200000CLZgd

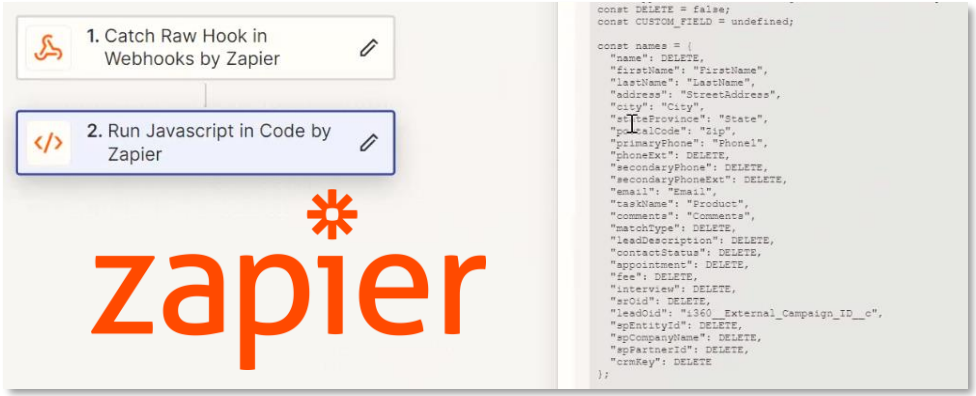
Transfer all Lead Sources & Source Costs using Data Loader

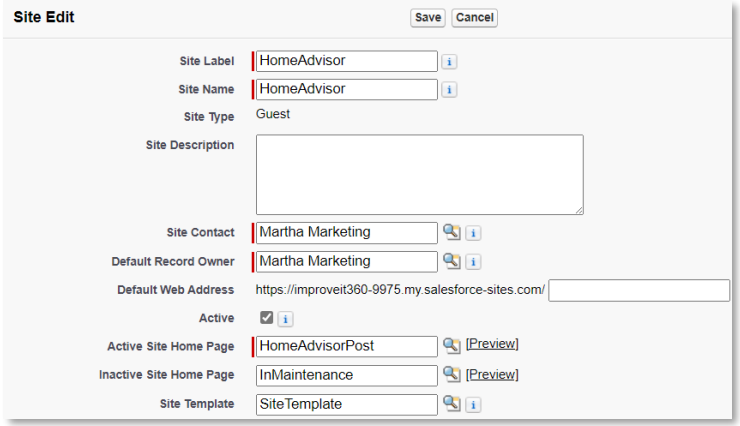
eLead Setup

HomeAdvisor and Angi are setup custom using a Zapier account to parse nested data

All other eLead integrations use a Standard eLead endpoint





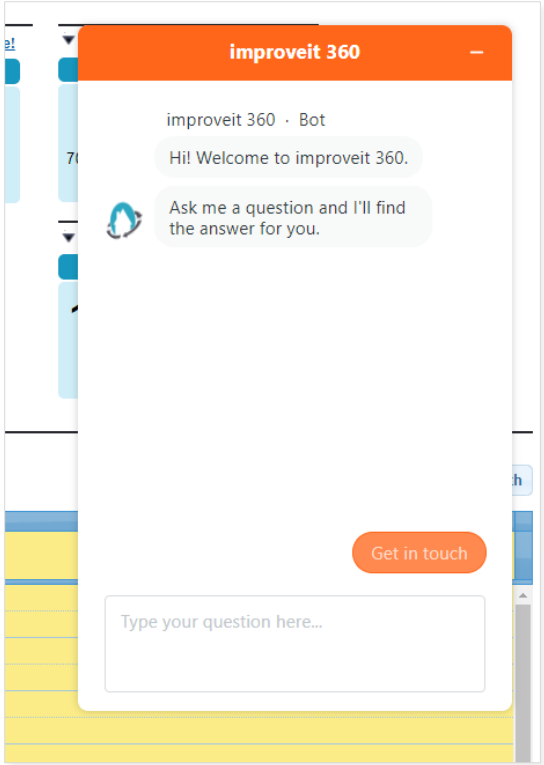


How to Reach Us

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



Thanks for Attending

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